

# California Technology Agency Billing System

## CalTABS

### Frequently Asked Questions (FAQs)



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## 1 PURPOSE

During the training for the CalTABS, the administrative team identified several questions which were repeated by Agency customers. The purpose of this document is to provide those frequently asked CalTABS questions and answers to all Agency customers.

## 2 GLOSSARY

Abbreviation	Definition
CalTABS	California Technology Agency Billing System

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## **3 FREQUENTLY ASKED QUESTIONS**

### **3.1 Accessing CalTABS**

#### **3.1.1 Q – How do I get my log on ID and who needs to approve it?**

*A – To request a user id for the CalTABS system, please open a Remedy Work Order. The Service Desk can be contacted by phone at 916-464-4311 or e-mail to: [cioservicedesk@state.ca.gov](mailto:cioservicedesk@state.ca.gov)*

*Please include the following information when requesting a CalTABS user id: Approver – note the name of your department contact who approves your request for a CalTABS user id, your name, your e-mail address, your phone # and the billing code(s) that you need access for (i.e., AA).*

#### **3.1.2 Q - Can employees access the CalTABS system from home?**

*A Yes, access to CalTABS is available via a web link from the following link: [HTTP://www.dts.ca.gov/CalTABS](http://www.dts.ca.gov/CalTABS)*

#### **3.1.3 Q - What is the CalTABS link/webpage location?**

*A –CalTABS Landing Page:*

*[HTTP://WWW.DTS.CA.GOV/CALTABS](http://www.dts.ca.gov/CalTABS)*

#### **3.1.4 Q – If we need a password reset or are unable to get to the login page, what should we do?**

*A – Please contact the Office of Technology Services service desk at (916) 464-4311 or via e-mail to [cioservicedesk@state.ca.gov](mailto:cioservicedesk@state.ca.gov).*

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**3.1.5 Q – When do the paper invoices stop being sent?**

*A – The Office of Technology Services (OTech) paper invoices were last mailed for the October 2012 invoice. The November 2012 invoices and invoice detail are available in the CalTABS system. Please note that the CalSTARS invoices are still being mailed each month to customers via paper copy.*

**3.2 Contact Information/Help Feature****3.2.1 Q – Is there going to be a “Contact Us” or “Help” tab within the application?**

*A – Yes, there is a “Help” tab on the CalTABS site that launches the CalTABS E-Training content which provides step by step assistance with accessing and using CalTABS. The contact information is available on the “Nav – Help Features” page.*

**3.3 Training Materials****3.3.1 Q – How can we get training on how to use the CalTABS and view the invoices?**

*A – Hands on training classes were held in August 2012. The CalTABS Training Manual is available to view and download at: [www.dts.ca.gov/CalTabs](http://www.dts.ca.gov/CalTabs). Assistance in navigating and using the CalTABS system is also available by sending an e-mail to [ciobilling@state.ca.gov](mailto:ciobilling@state.ca.gov).*

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## **4 HELPFUL INFORMATION**

### **4.1 CalTABS Landing Page**

[HTTP://WWW.DTS.CA.GOV/CALTABS](http://www.dts.ca.gov/caltabs)

### **4.2 Contact Info**

For billing inquiries or CalTABS assistance, please contact [CIOBILLING@STATE.CA.GOV](mailto:CIOBILLING@STATE.CA.GOV)

Application Errors please contact [SERVICEDESK@STATE.CA.GOV](mailto:SERVICEDESK@STATE.CA.GOV) or **(916) 464 - 4311**

## **5 GENERAL USER INFORMATION**

Customer ID: Please use your customer id for 'Run Reports' with an 'X' in the third placeholder of the customer id.

For example: AAX

### ***Q - How long will the Published Reports (Invoice Summary and Invoice by Account Code) be available?***

A – Published Reports (Invoice Summary and Invoice by Account Code) will be available 4 years + 1 = 5 years total.

### ***Q - Will Prior Year information be available?***

A – Yes, Prior Year (FY 11/12) and July 2012 – October 2012 Invoice Summary and Invoice by Account Code will be available in an Excel report format. These reports are currently being developed.

### ***Q – Will we receive an e-mail notification when invoices are available each month?***

A – Yes, an e-mail will be sent to notify the CalTABS users when the monthly invoices are available to view. An e-mail notification will be sent each month.

### ***Q – Why do the Excel formatted reports not include totals?***

A- The Excel formatted reports are designed for the customer to sort, filter and add totals based on their reporting and analysis needs.

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***Q – How are adjustments posted or processed?***

A – Adjustments are processed in subsequent months. The process is for customers to submit requests for adjustments to: [ciobilling@state.ca.gov](mailto:ciobilling@state.ca.gov). We then review the request and research if more information is needed from the service area to approve the adjustment. The adjustment is then processed once we receive the approval for the request. Adjustments appear under the X301 Request for Adjustment Report or the X300 Debit/Credit report under Run Reports/Invoice Detail Reports.

***Q – Why are Tape Mount Charges Displayed in CPU Detail (C100)?***

A – Tape Mounts are part of the job costs and are included in the CPU detail so that all the job costs for a particular job name can be researched and totaled in a single report.

***Q – Why are data sets not included in the CPU detail report (C100)?***

A – Data sets are included in the S100 Mainframe Disk Storage Detail report for Disk storage. Tape Storage detail is included in the S213 Tape Storage Detail report.

***Q – Are the CGen costs identified by service codes?***

A – The CGen detail report has categories and no service codes are currently listed. The detail report headings are as follows:

**Circuit; Comment; Install; Location; One Time; Adjust; Telco; lhub; Otech; Retire; Total; Rec Name; And Install SR.**

We are working on creating a report that will identify Service Codes for the CGen charges.

***Q – Printing Reports in Excel format. The Excel formatted reports does not print on 8.5 x 11 paper.***

***A – For Excel reports; these are formatted to print based on your printer definitions. You can select No Scaling and then select ‘Fit Sheet on One Page’; ‘Fit All Columns on One Page’; ‘Fit All Rows on One Page’***

***Q – Print function using the Print Icon in the Detail reports.***

A - To print a report from the 'Run Reports', Invoice Detail Reports, select either the **PDF** or **Excel** formats and export to the appropriate format by selecting the Diskette Icon to **export** the report to PDF or Excel. After you export the report you can open it and then either print the report or do a save as to save it to your local drives/folder. To print the report in Excel, you may need to use 'Fit to Page' or 'Set Print Range' so that the report will print on 8.5 X 11" paper.